

Osprey Approach: Send an SMS Text Message

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The latest version is always online at
<https://support.ospreyapproach.com/?p=52840>

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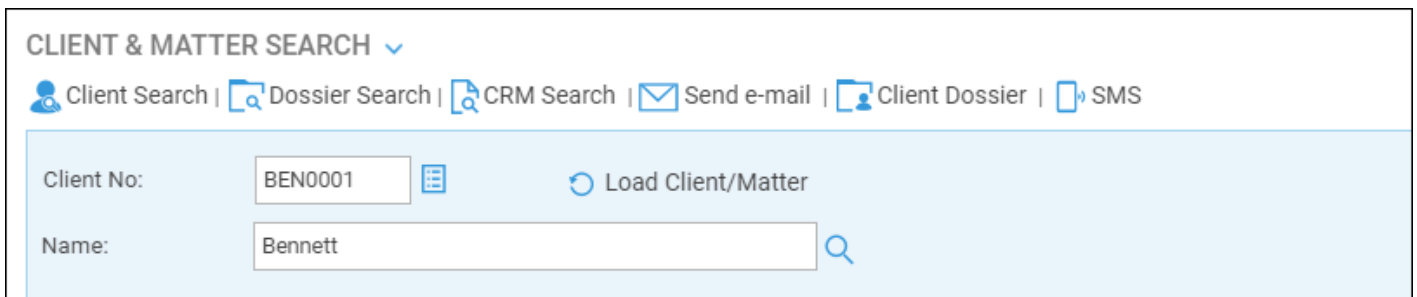


A step-by-step guide on how to send an SMS text message to your client from Osprey

Within Osprey, there is the ability to send SMS text messages straight to your clients, or include them as part of a workflow.

How to send a SMS text message

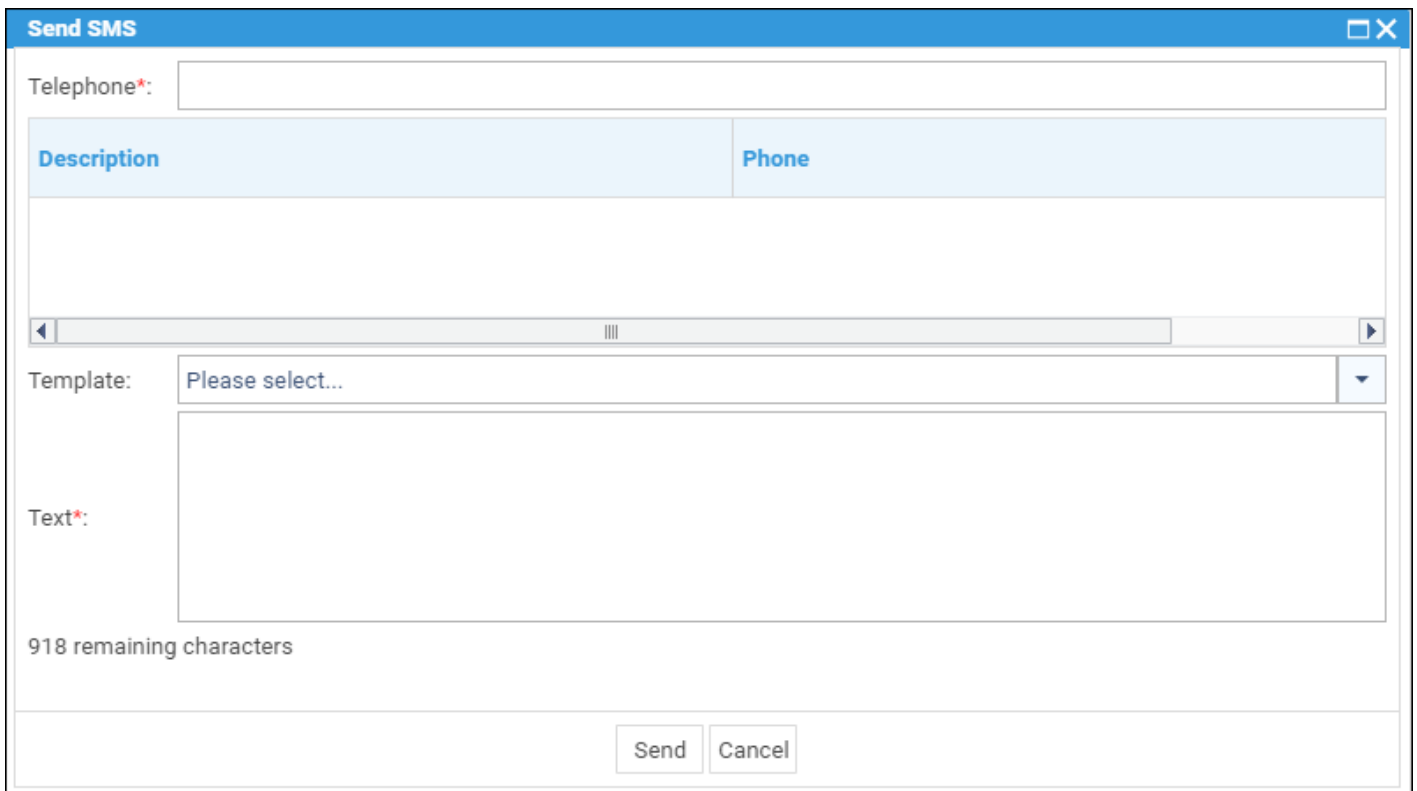
Navigate to Clients & Matters > Clients. At the top of the screen there is an 'SMS' button



The screenshot shows the 'CLIENT & MATTER SEARCH' section of the Osprey interface. At the top, there are navigation links: 'Client Search', 'Dossier Search', 'CRM Search', 'Send e-mail', 'Client Dossier', and 'SMS'. Below these links, there are two search fields. The first is labeled 'Client No:' and contains the text 'BEN0001'. To its right is a 'Load Client/Matter' button with a circular refresh icon. The second search field is labeled 'Name:' and contains the text 'Bennett'. A magnifying glass icon is positioned to the right of the 'Name' field.

Once you have selected the 'SMS' button, a pop up box will appear where the number may be automatically generated from the information stored within the client details. If the number is not automatically generated, you can manually enter the number into the box.

You can then select a template from the drop-down menu. Once you are happy with the message, click 'Send'.



The screenshot shows the 'Send SMS' pop-up window. At the top, there is a blue header bar with the text 'Send SMS' and a close button (X). Below the header, there is a 'Telephone*' field. Underneath this is a table with two columns: 'Description' and 'Phone'. The table is currently empty. Below the table is a horizontal scrollbar. Under the scrollbar, there is a 'Template:' label followed by a drop-down menu showing 'Please select...'. Below the drop-down menu is a large text area labeled 'Text*'. At the bottom left of the text area, it says '918 remaining characters'. At the bottom center of the window, there are two buttons: 'Send' and 'Cancel'.